UPDATING INFORMATION

Agency

An agency official must notify the TRS when changes are made to the payroll or personnel contact persons, phone numbers, mailing and/or physical addresses. Verification of changes must be submitted in writing to: Teachers' Retirement System of Alabama, Post Office Box 302150, Montgomery, Alabama 36130-2150.

Member

Name Changes

Agencies must change the name of the member on the monthly *Retirement Contribution Report*. A notice from the member in a letter or on a FORM 100 will not change the name on the active member's retirement account.

> **Note:** Inactive member name changes: The member must submit a copy of the legal document authorizing the name change.

Address Changes

The TRS will mail to its members important information such as:

- RSA newsletter, the *Advisor*
- Board of Control election information

It is essential for the TRS to be informed of an employee's change of mailing address. Each agency is provided Address Change Notification cards. Additional cards may be obtained by calling the TRS or by downloading a form from our Web site.

To change a member's address, the TRS can be notified by a submission of one of the following:

- A postage paid ADDRESS CHANGE NOTIFICATION CARD (ADDCHG)
- A downloaded ADDRESS CHANGE NOTIFICATION FORM
- A signed, written request or letter
- The FORM 100, MEMBER INFORMATION RECORD

To change a retired member's address for receipt of his or her retirement check, a signed written request or letter from the retiree or the retiree's legal representative must be received by the TRS.

Beneficiary Changes

New members designate a primary and contingent beneficiary on the FORM 100, MEMBER INFORMATION RECORD. If the member wishes to change the beneficiary designation, the appropriate portions of a FORM 100 must be completed with the member's signature acknowledged by a notary public. If a member is designating more than one primary beneficiary and/or contingent beneficiary, a FORM MB, DESIGNATION OF MULTIPLE BENEFICIARIES PRIOR TO RETIREMENT, may be completed.

If the member's primary beneficiary predeceases him or her, the TRS will pay the contingent beneficiary any benefits due at the death of the active or inactive member. If, at the member's death, no beneficiary is designated, the estate of the member will be paid the appropriate death benefit payment.

Beneficiary changes for retired members must be referred to the TRS for the appropriate forms.

Date of Birth Documentation

If a controversy arises regarding the date of birth of the member or a designated beneficiary, the member must provide one of the following*:

- An original or certified copy of the birth certificate issued by the state in which birth occurred
- Delayed birth certificate issued by the state in which birth occurred
- Bureau of Census Report from the U.S. Census Bureau stating the age of the individual at a census year when the person was less than 20 years old (This document verifies year of birth only.)
- An original or certified copy of the Baptismal Record or Parish Record providing the age of the individual at the time of baptism
- An original or certified copy of the Family Bible record indicating the individual's date of birth
- An original or certified copy of the school record indicating the individual's date of birth
- Insurance policy indicating the individual's date of birth provided the policy is dated prior to the member's enrollment in the RSA.

*The form, RSA-14, ACCEPTABLE PROOF OF AGE DOCUMENTS, verifies the correct method(s) required for certifying a copy of an original document and provides more detailed information regarding the documentation that is acceptable by the TRS to verify a date of birth.

Social Security Number Corrections

The member's Social Security number (SSAN) must be correctly reflected on the monthly payroll deductions reconciliation report.

- If there is an error in the SSAN, the agency must correct the member's Social Security number on the monthly report.
- The agency must provide the TRS with a copy of the member's Social Security card to verify the correct number in order for the TRS to correct the member's account information.
- A notice from the member in a letter or on a FORM 100 will not change the Social Security number on the retirement account.